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# *Evolution of user needs and postal markets in SPAIN.*

Deputy Direction for Postal Affairs  
3rd May 2018



## New environment

- ❑ For the last five years, it is clear that we have experienced not an evolution of citizens' needs, but a complete transformation of them. He have moved from analog citizen to digital citizen.
- ❑ The Universal Postal Service has to evolve to fill these new needs. The European and Spanish postal regulation, already eight years old, is in evolution, with proposals and measures on discussion.



## From analog citizen to digital citizen

In late 2017, the billing of e-commerce exceeded 7.700 millions EUR with an interannual growth rate of 26%.

If we look at the number of transactions, in the third term of 2017, there were more than 126 millions of transactions.

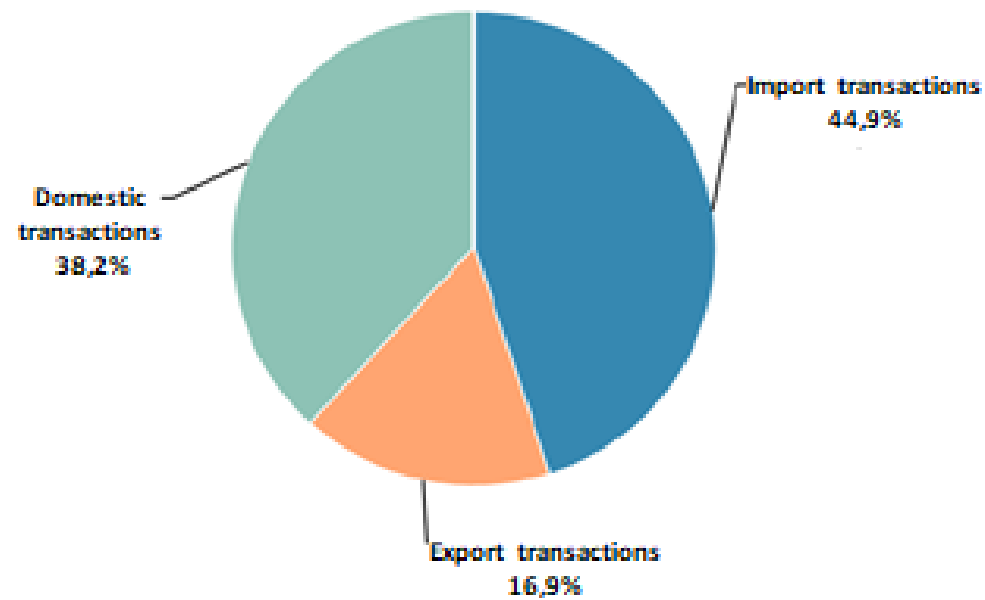
The third branch of the activity, with the highest turnover, is clothing sales, which require the use of postal services.



There are no borders.

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E-COMMERCE SALES IN SPAIN BY KEY GEOGRAPHIC SEGMENT (percentage share )

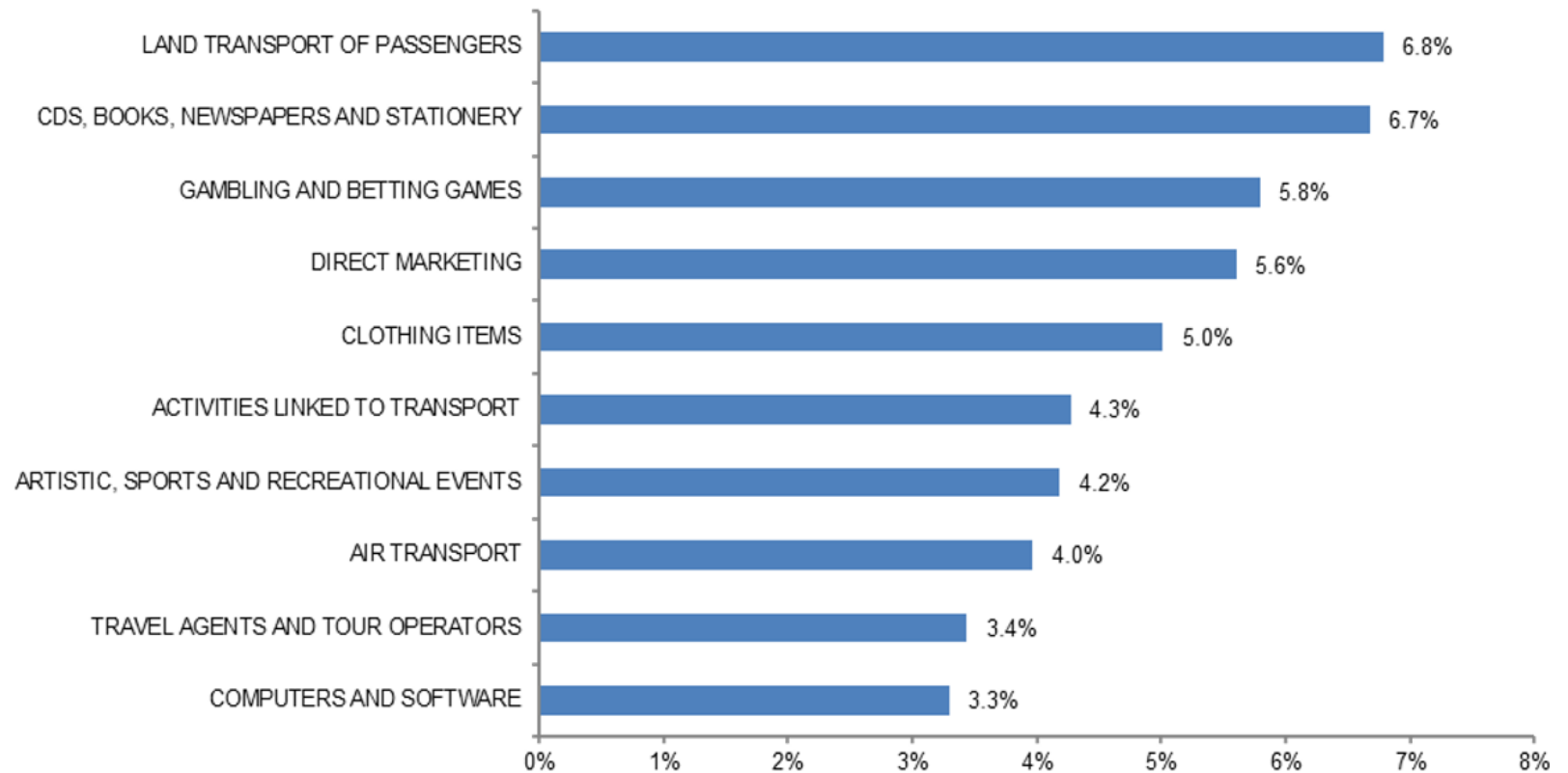


Source: CNMC



## Activity areas

THE TEN AREAS OF ACTIVITY WITH THE HIGHEST PERCENTAGE OF E-COMMERCE TRANSACTIONS (III-17, percentage)

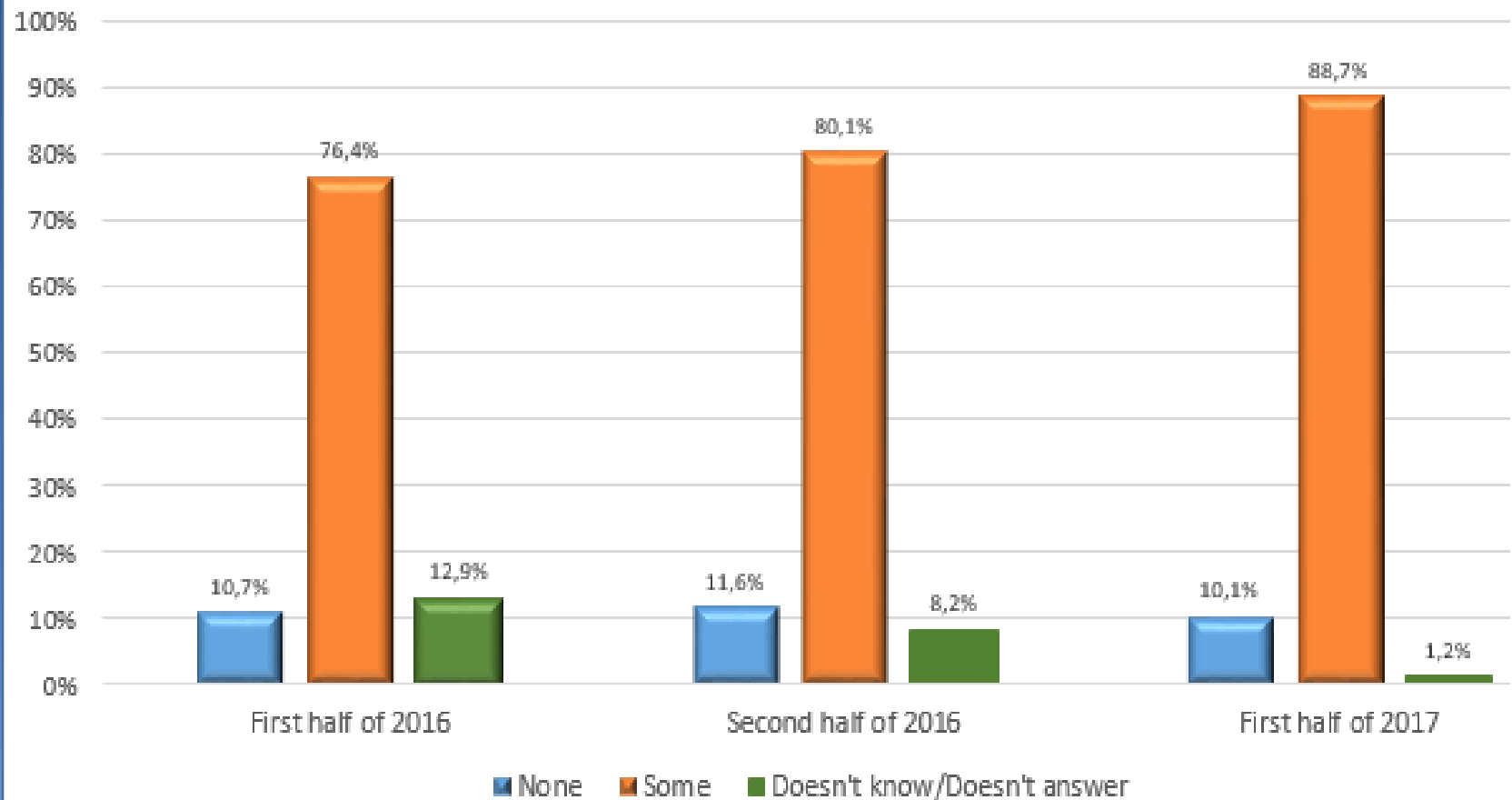


Source: CNMC



## A revolution for the postal sector

Share on individuals who received parcels purchased online in the last six months  
(2016 - I semester 2017)



Source: CNMC Community Household Panel (individuals who have made any purchase on Internet)



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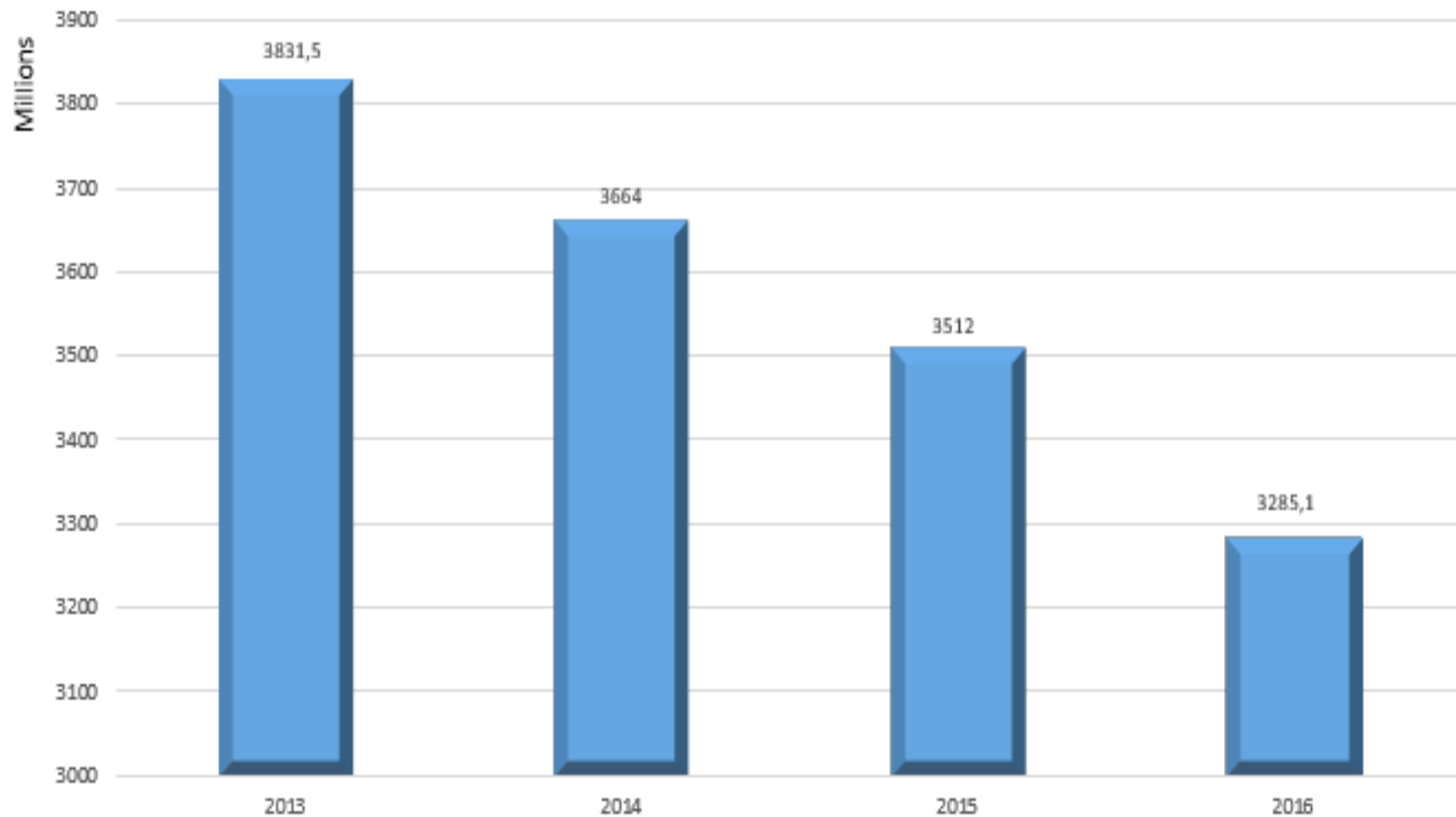
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# The trends of postal sector in Spain



## The traditional postal sector

Evolution of postal items delivered in the traditional postal sector (2013-2016)



Source: Prepared in-house based on data provided by companies





## Courier, commercial parcels and express services.

Evolution of postal items delivered in courier, commercial parcels and express services (2013-2016)



# Thank you for your attention

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